Please find attached the *Summary of Phase II – Public Input and Stakeholder Meeting Process*. It is recognized that this information represents an important input to the process of developing a Gaming Strategy for Nova Scotia.

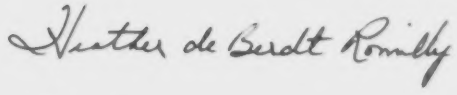
Over a period of four months, from August 2004 to the end of November, I was involved in listening to the input of Nova Scotians about the future direction of gaming in the province. Specifically, this involved direct meetings with key stakeholders and analysing input from many others. Over 2,340 copies of the discussion paper were distributed, a total of 156 stakeholders attended meetings and 148 written responses were received.

Overall, there was considerable interest in developing a coordinated, comprehensive Gaming Strategy for the province. While groups and individuals had specific and differing opinions about what the future direction should be, there was considerable consensus regarding the need for change in the gaming environment in Nova Scotia.

The focus of this Summary is to provide a high-level overview of common areas of focus which emerged from the opinions and comments received. It centres around comments and feedback on the key strategic elements such as vision, principles and policy areas, as well as areas where there is consensus that change and improvement is required. The Summary will also assist with the development of recommendations for the next phase of the process.

Stakeholders and the public have provided considerable feedback and input for your consideration. The views and opinions expressed through this process will be an important component of the information (including existing research, expert opinion, experience from other jurisdictions, and public opinion research) which is required to be considered in the development of a Gaming Strategy. The comments from Nova Scotians should inform Phase III, as decisions are made and the overall strategy developed.

I would like to take this opportunity to thank all of the stakeholders and respondents who shared of their valuable time to contribute to this process. It has been a privilege to meet with and hear from the people directly involved and impacted by gaming in this province. It is hoped the Summary will be of valuable assistance to the Gaming Strategy development process.



Sincerely,
Heather de Berdt Romilly, B.Comm, LL.B., LL.M.

1. Introduction

In 2003, the Nova Scotia Gaming Strategy process was initiated to review the current state of the gaming sector in Nova Scotia. The purpose was to identify the challenges and opportunities in the areas of gaming operations, research, regulation and enforcement, prevention and treatment of problem gambling and management of revenues. The objectives were to determine the appropriate future direction of gaming in Nova Scotia and to pursue the development of a coordinated, integrated strategy to support the achievement of that future vision. A further objective was to establish a process through which a number of inputs could be gathered in order to inform the gaming strategy development process.

The Gaming Strategy process consists of three phases. Phase I involved the preliminary development of a vision, policy objectives and guiding principles by a working group of senior officials representing the gaming and health promotion sectors. That preliminary strategy concept development work culminated in a Discussion Paper released on August 12, 2004 which was intended to be a mechanism to spark discussion and encourage external stakeholders and members of the public to consider their views and to share their thoughts on the overall future direction of gaming in Nova Scotia. Nova Scotians were asked to comment on a series of questions from the Discussion Paper and to share any other comments or input. This public input and stakeholder consultation process constituted Phase II of the Gaming Strategy process.

An essential part of the Gaming Strategy process was to receive public input. Phase II involved holding a series of stakeholder meetings with a diverse range of organizations including gaming operators, gaming retailers, gaming manufacturers, harness racing representatives, members of a First Nations community, social scientists, individuals working in the addictions services field, community health board members, and individuals working in problem gambling services. Initially, six weeks were designated for Phase II. However, a significant number of stakeholders asked for an extension to the period of time for meeting and making submissions and the deadline was extended by an additional four weeks to November 30, 2004.

There was a great deal of interest in the Discussion Paper from across Nova Scotia. Over 2,340 copies of the Discussion Paper were distributed and it was posted on the government website. The public was invited to participate in the process through a series of advertisements in provincial and community newspapers which included a 1-800 telephone number and website address to assist interested parties in accessing the Discussion Paper. Copies of the Discussion Paper were also made available through Access Nova Scotia sites located around the province. In total, there were 148 written or e-mailed responses received.

Throughout this Phase II process, a number of excellent ideas and suggestions were identified. The feedback received through Phase II will help inform the next phase of the Gaming Strategy process, Phase III, which will involve policy development and implementation.

There are several important inputs in the development of a gaming strategy for Nova Scotia of which the Phase II public input and stakeholder meeting process is just one. The full list of inputs is outlined below.

1. Phase II: Meetings were held with 156 external stakeholders representing 37 organizations in cities and towns across the province to ensure a diverse range of organizations had a meaningful opportunity to share their perspectives on the future of gaming in Nova Scotia. In addition, input was received from respondents who provided their views in writing.
2. Review of empirical research and literature
3. Review of other jurisdictions' experiences and models
4. Experts' review and analysis
5. Public opinion research

These inputs will be considered as decisions are made in Phase III, with the end goal of developing a coordinated Gaming Strategy for Nova Scotia.

2. Public Input and Stakeholder Meeting Process

During the second phase of the Gaming Strategy process, every effort was made to meet and consult with stakeholders and interested parties to discuss their views regarding the future direction of gaming in Nova Scotia. Members of the public were encouraged to provide written comments through letter or e-mail.

Following the release of the Discussion Paper, efforts were made to inform Nova Scotians of the importance of the document and the need for responses to the questions posed. Respondents provided feedback using a variety of methods including the feedback form included in the Discussion Paper and located on the website, through comments and formal submissions.

Public Feedback

Form of Responses	Number of Responses
Feedback Forms/Comments	129
Submissions	19

Series of Ads

A series of ads were placed in the following papers to provide information and invite participation and input from Nova Scotians.

Publication	Circulation	Date of Publications
Daily Papers:		
Halifax Chronicle Herald	107,083	Aug. 14/04, Sept. 18/04, Oct. 14/04, Nov.27/04
Halifax Daily News	28,105	Aug. 15/04, Sept. 19/04, Oct. 13/04, Nov.28/04
Amherst Daily News	5,017	Aug. 14/04, Sept. 18/04, Oct. 13/04, Nov.29/04
Truro Daily News	8,415	Aug. 14/04, Sept. 18/04, Oct.13/04, Nov. 27/04
New Glasgow Evening News	8,015	Aug. 14/04, Sept. 18/04, Oct.13/04, Nov.27/04
Sydney Cape Breton Post	2,559	Aug. 14/04, Sept. 18/04, Oct. 13/04, Nov. 27/04
Yarmouth le Courrier (French)	4,195	Aug. 20/04, Sept. 17/04, Oct. 15/04
Community Papers:		
Annapolis Spectator	1,304	Aug. 17/04, Sept. 21/04, Oct. 19/04
Antigonish Casket	5,634	Aug. 17/04, Sept. 21/04, Oct. 13/04
Berwick Register	1,801	Aug. 18/04, Sept. 22/04, Oct. 20/04
Bridgewater Lighthouse Log	26,065	Aug. 18/04, Sept. 22/04, Oct. 13/04
Digby Courier	2,099	Aug. 18/04, Sept. 22/04, Oct. 13/04
Greenwood Aurora	5,900	Aug. 16/04, Sept. 20/04, Oct. 13/04
Guysborough Journal	1,829	Aug. 18/04, Sept. 22/04, Oct. 13/04
Inverness Oran	4,990	Aug. 18/04, Sept. 22/04, Oct. 13/04
Kentville Advertiser	6,227	Aug. 18/04, Sept. 22/04, Oct. 15/04
Liverpool Advance	3,070	Aug. 18/04, Sept. 22/04, Oct. 13/04
Middleton Monitor-Examiner	1,903	Aug. 18/04, Sept. 22/04, Oct. 20/04
Oxford Journal	2,527	Aug. 18/04, Sept. 22/04, Oct. 13/04
Pictou Advocate	3,700	Aug. 18/04, Sept. 22/04, Oct. 13/04
Port Hawkesbury Reporter	2,437	Aug. 20/04, Sept. 21/04, Oct. 15/04
Shelburne Coast Guard	4,307	Aug. 17/04, Sept. 21/04, Oct. 20/04
Springhill/Parrsborro Record	1,617	Aug. 18/04, Sept. 22/04, Oct. 13/04
Windsor Hants Journal	3,174	Aug. 18/04, Sept. 22/04, Oct. 20/04
Yarmouth Vanguard	5,836	Aug. 17/04, Sept. 21/04, Oct. 15/04

Meetings with Stakeholders

Meetings with stakeholders were conducted to provide interested organizations with an opportunity to discuss and ask questions about the Discussion Paper. The particulars of the scope of the meetings and the stakeholders who attended are noted below. There were a total of 29 meetings and a total of 156 external stakeholders at these meetings.

Stakeholder	Number of Participants	Scope/Dimensions of Stakeholder
Addiction Services, Directors (District Health Authorities)	7	38 Addiction Services Offices are located across Nova Scotia.
Alcohol and Gaming Division, Department of Environment and Labour	1	Has the legislative responsibility to regulate and control gaming activities in the public interest and in accordance with the principles of honesty and integrity. The Division licenses and monitors the conduct of casinos, bingos, lotteries and other games of chance (exceptions include harness racing and gaming activities on First Nations reserves) to ensure compliance with the regulations.
Atlantic Lottery Corporation -Executive Team -Ticket Lottery Division -Video Lottery Division	 8 8 10	Established by governments in the four Atlantic provinces. Net profits are returned to general revenue of each province. ALC has 517 employees and partners with over 6,000 lottery retailers.
Canadian Restaurant and Food Service Association (CRFA) -CRFA Member – Big Leagues	1 3	A national organization with members in Nova Scotia controlling approximately 1,200 of the 1,700 commercial food service establishments (a significant number of these do not have a lounge licence).
Casino Nova Scotia -Halifax -Sydney	 8 3	Operates three businesses in Nova Scotia which employ approximately 1,500 employees.
Charitable Bingo -Amherst	 1	The Knights of Columbus, Amherst Division has approximately 130 members.
Charitable Bingos -Halifax	 5	These are non-profit organizations. Scope information was provided by four organizations including the Halifax Forum Community Association, Dartmouth Sportsplex Community Association, Bazaar & Novelty, and Sackville Leisure Centre.
Charitable Bingo -Port Hawkesbury	 2	The Port Hawkesbury Lions Club has approximately 24 members and is committed to serving the needs of the community.
Community Health Board, Colchester East Hants & Health Authority (CEHHA)	11	The CEHHA is one of nine district health authorities in Nova Scotia. Delivers a wide range of health services to more than 73,000 residents of Colchester County and East Hants. The community health boards are volunteer boards which make recommendations to CEHHA regarding local health concerns and needs.
Community Health Board, Shelburne County	1	The Shelburne Community Health Board has 12 volunteer members who work with the community on health issues that matter most to members of the community.
Crosbie House Society	2	The Society is soliciting support to open a new not-for-profit addictions recovery program for its partners and, through charitable donations, to those suffering from addiction.
Dalhousie University, Department of Psychology	2	The Dalhousie Gambling Lab is managed by the principle investigator, Dr. Stewart, who specializes in research regarding gambling and alcohol abuse.
District Health Authorities (Nova Scotia), Chief Executive Officers	14	There are nine district health authorities for the Province of Nova Scotia which service the health needs of all Nova Scotians.

Stakeholder	Number of Participants	Scope/Dimensions of Stakeholder
FGI (Problem Gambling Helpline)	1	Provides employee assistance programs to the private and public sectors internationally. And employs 12 employees and approximately 60 counsellors In Nova Scotia.
Focal Research Consultants	2	A social and marketing research firm with over 14 years experience conducting gambling research.
Gamblers Initiatives Group	15	Comprised of 10 members from Addiction Services across the District Health Authorities (representing 375 staff), 1 member from the Problem Gambling Helpline (representing 6 staff) and 2 members representing the Office of Health Promotion, Department of Health. GIG provides advice to Directors of Addiction Services regarding problem gambling services.
GPI Atlantic	2	A non-profit research organization with a staff of approximately 35 individuals.
Legion Command	3	Nova Scotia Command is one of 10 provincial commands; it is divided into one district and 15 zones with 119 branches throughout the province. Mandate to assist veterans and their dependants and broader community.
Lounge and Beverage Room Association of Nova Scotia	30	Provincial body with 265 members representing majority of the province's for-profit video lottery retailers.
Marguerite Centre	2	Long-term residential facility with 12 beds for women in recovery from addictions. Employs 10 staff. Only facility of its kind for women in Nova Scotia.
Maritime Provinces Harness Racing Commission	4	Represents 15,000 members including 536 members from Nova Scotia.
Millbrook First Nation	3	Governed by a Chief and 11 Councillors who are elected every 2 years. Hosts 1,400 members across Canada.
Nova Scotia Harness Racing	3	Includes the Nova Scotia Provincial Exhibition which employs 80 staff and 1,300 horsemen and the Nova Scotia Harness Racing Industry Association which employs 150 employees and 750 horsemen between Truro, Inverness and Sydney racetracks.
Tourism Industry Association of Nova Scotia (TIANS)	2	TIANS employs 8 staff and represents 2,000 members in the business of tourism and 80 associations and societies. The Nova Scotia Tourism Human Resource Council works with TIANS, employs 7 staff and develops human resource programs to develop a professional workforce for the tourism industry.
Video On-line Lottery Terminators Society	2	Represents individuals and families severely affected by VLTs.

3. What Was Said

Throughout the Phase II public input and stakeholder meeting process, feedback was received from many Nova Scotians who have an interest in the future direction of gaming in Nova Scotia. Through the many meetings which were held and responses received, a number of comments and suggestions were provided regarding the new directions for gaming outlined in the Discussion Paper.

The information compiled through the meeting process, reflects the views and opinions as expressed by stakeholders. Phase III will consider this information as one input in the context of a variety of other inputs mentioned earlier (i.e. research, expert opinions, etc.).

It is important for the reader to note that not all stakeholders provided comments on all of the sections outlined in this document. Where a majority of stakeholders expressed a common perspective or shared issues, this is identified as a Common Area of Focus.

This paper is a summary of the feedback and provides an overview of this information, highlighting a number of common themes and outlining suggested next steps for action. The feedback was thoughtful, informative and diverse. The many comments and suggestions which we received have been summarized under the following categories.

3.1 Common Areas of Focus
3.2 Future Direction of Gaming
3.3 Suggestions for Gaming Strategy Development

3.1 Common Areas of Focus

A strength of the public input and stakeholder meeting process is that a diverse array of external stakeholders and Nova Scotians shared of their valuable time through participation in the process and provided a range of views and opinions. It is notable that many stakeholders and Nova Scotians, from their varied perspectives, shared common views on a range of topics which are outlined below.

A review of the minutes of the meetings with external stakeholders, in addition to the submissions and feedback forms and comments received, reveals a number of themes that are repeated consistently by a majority of participants in the process and these themes are presented as common areas of focus.

Overall, there was strong support amongst respondents regarding the need for change in the gaming environment in Nova Scotia. In terms of specific concerns and recommendations, stakeholders and members of the public who participated in the process said that the gaming strategy should:

3.1.1 – recognize the need for greater emphasis on social responsibility and the development of consistent social responsibility standards which are applicable to everyone involved in the gaming industry and focus on protecting those most vulnerable;

3.1.2 – recognize issues of concern regarding continuous electronic gaming (with particular emphasis on the accessibility and availability of VLTs) and the emergence of on-line gaming and carefully assess decisions about the types of games which are approved, including considering long-term impacts;

3.1.3 – include an education and awareness campaign regarding responsible gaming and the use of quality research to assist decision-making;

3.1.4 – consider and quantify the social costs of gaming in order to determine the net contribution of gaming;

3.1.5 – build on the Province's established leadership role in managing problem gambling;

3.1.6 – define outcomes and measure results through objective, balanced research and/or analysis to determine if the attributes of social responsibility and economic sustainability are being met;

3.1.7 – establish consistent regulations;

3.1.8 – prevent the illegal/criminal element from taking hold of the industry; and

3.1.9 – clearly define roles and responsibilities for everyone involved in gaming, including those involved in the economic and social spectrum of gaming.

There was strong support for the initiative and the fact of government seeking broad-based feedback on the Discussion Paper. Respondents recognized the initiative as being a significant undertaking.

3.2 Future Direction of Gaming in Nova Scotia – Vision, Policy & Principles

In reviewing the current status of the gaming industry and the many challenges which exist, the need for a vision to guide the future development of the gaming industry in Nova Scotia was clear. This vision will set the direction for how the Government of Nova Scotia will move forward. Many stakeholders and Nova Scotians through the input and meeting process indicated that the future direction of gaming should:

3.2.1 – ensure a careful balancing of social responsibility and economic sustainability with more weight being given to social responsibility;

3.2.2 – define the term "socially responsible" in a manner that identifies deliverables, outcomes and timelines;

3.2.3 – define "economically sustainable" to include decreasing reliance on gaming in a socially responsible manner, the removal of barriers to business market conditions, establishing revenue targets, delineating roles and responsibilities, and providing funding for problem gambling services proportionate to the rates of problem gambling; and

3.2.4 – inform the public about where the gaming revenues are directed.

The Discussion Paper outlines a number of policy objectives and guiding principles suggesting a basis for a new vision of gaming in Nova Scotia. A number of stakeholders across the economic/social spectrum indicated general agreement with the vision, policy objectives and guiding principles.

A number of respondents indicated agreement in principle with the vision statement and guiding principles. Overall, those who noted some disagreement with the vision, principles and policy objectives did so primarily because they felt a need for greater emphasis on social responsibility.

Some respondents noted that the intention to balance social responsibility with economic return from gambling is logical and necessary - particularly from a public health and social policy perspective.

A number of respondents also indicated that the concept of responsible gaming is predicated on the need for government to adopt collaborative approaches and engage in partnerships with communities, stakeholders and consumers. These respondents considered this type of engagement to be necessary to achieve the socially responsible balance in question, and to be both reasonable and supportable.

A number of respondents also commented favourably upon the underlying principles of transparency, accountability, informed consumer participation and objective research and analysis – as the basis for making important gaming decisions

A number of respondents expressed concern regarding the need for clear definitions of the terms included in these statements in the ultimate gaming strategy.

Some respondents indicated the initial reaction to New Directions was positive but that a further reading of the content revealed that it did not fully develop or define concepts of social responsibility and economic sustainability and that any ultimate strategy should clearly articulate what is meant by these concepts.

Differing views of the definition of social responsibility were expressed with some stakeholders noting that such requires the removal of the most addictive forms of games while other stakeholders noted the need for emphasis on prevention and treatment.

A number of respondents highlighted the need for social responsibility to be given foremost consideration.

A common theme expressed was that government needs to reduce reliance on high-risk gaming products.

Many respondents identified game design as being an integral part of social responsibility.

These respondents recommended that government develop games which appeal to social players and avoid those which appeal to problem gamblers which are characterized as being newer, faster, and louder.

A number of respondents viewed social responsibility as requiring action on the availability and accessibility of VLTs.

A common comment expressed by respondents was that access to VLTs needs to be controlled to restrict availability.

Some respondents also considered the public had a role to play in social responsibility.

Some respondents considered that from an integrity and responsibility point of view, the industry needs to present products along with the risks, but there also needs to be public willingness to receive this information.

A number of respondents considered that partnerships with industry operators and government in the areas of health and education will be critical to effectively communicate responsible gaming, the role of government and how profits are used for public good.

A number of respondents also considered that social responsibility included consideration of the impacts of gaming on charities.

A common comment of these respondents was that it is difficult for charities to successfully operate, since government treats charities in the same manner as commercial establishments with no recognition of the different mandates.

Some respondents also noted that partnerships between economic and charitable organizations could be mutually beneficial and should be explored in further detail. Some respondents considered there would be merit in considering partnerships with the harness racing industry.

3.3 Suggestions for Gaming Strategy Development in Phase III

A number of the respondents outlined suggestions in a number of areas to assist with the development of a Gaming Strategy in Phase III.

Specifically, the following areas were suggested as focus points for developing the future strategy:

- Develop social and economic criteria
- Engage First Nations in gaming discussions
- Improve the quality of prevention and treatment services
- Ensure a cooperative process for the development of a gaming strategy
- Strengthen gaming safeguards
- Strengthen the gaming decision-making process

3.3.1 Develop Social and Economic criteria

The Discussion Paper set forth the policy objective of ensuring a socially responsible and economically sustainable gaming industry in Nova Scotia in order to realize the future vision for gaming in Nova Scotia. Many respondents identified the need for social and economic criteria to be defined in order for this objective to be achievable.

A number of suggestions were provided regarding the definition of the social and economic criteria:

A number of respondents recommended the development of criteria for establishing and measuring an appropriate balance between public health and gambling and to identify roles and responsibilities – there was an identified need to include economic and social responsibility outcomes and to have an evidence-based evaluation strategy to help measure the gains and losses in these areas.

In the development of social responsibility criteria, a number of suggestions were made by respondents including the need to consider inclusion of game design requirements such as card technology, and negative impacts on people with a view to ensuring any game (i.e. new or redesigned) will meet the test of "do no harm" prior to introduction.

There was support among many respondents for government to set the goal of reducing government reliance on gaming revenues as part of the strategy – and to include a commitment that future budgets would not be developed based upon increased revenue from this source as a means to sustain programs.

A number of respondents also suggested that the government position economic sustainability as assisting government with its primary mandate of working for individual and community health and well-being; it was considered that the latter should form the overriding principles which guide strategy development.

There is a great deal of support for introducing "social responsibility" and "economic sustainability" standards. A number of suggestions were received regarding the emphasis to be given each term. Varying opinions existed regarding the translation of social responsibility into criteria. The following demonstrate the views expressed:

A few respondents considered an appropriate analogy to be that the alcohol industry is not making the product taste bad as part of social responsibility.

There was strong support among respondents to recognize (a) the charitable sectors' role in providing a safety net to the public and (b) the erosion of charitable bingo as a charitable gaming institution.

A few respondents also identified the opportunity for partnerships to be undertaken with the harness racing industry to promote socially responsible gaming.

It was noted that in order for these standards to be effective, they would need to be legislated and there would need to be a monitoring process that would ensure such standards are being met.

On the social responsibility front, many respondents expressed concern regarding VLTs and the emergence of continuous electronic forms of gaming. A number of

respondents considered that social responsibility should be defined, in the context of VLTs, to include the following:

Reduce access to VLTs, remove bill acceptors and automatic banking machines located close to VLTs and review overall management of VLTs.

Remove VLTs from lounges and placement in entertainment centres, with racinos being a suggested model by some respondents.

Design VLTs to be more socially interactive and develop mechanisms to benefit charities and educate and improve public awareness through partnership arrangements between licensed VLT establishments and charitable organizations.

3.3.2 Engage First Nations in Gaming Discussions

A number of respondents identified the importance of First Nations being treated as another level of government regarding discussions on gaming. The Discussion Paper outlined the Province's decision to enter into agreements with First Nations communities to offer VLTs on reserves in 1995.

Concerns were identified regarding the creation of addictions issues related to gaming being offered on reserves. Many respondents supported the need for social responsibility standards to be applied to all organizations involved in gaming, including First Nations.

The following demonstrate the views expressed by respondents:

Involve First Nations stakeholders in all activities associated with responsible gaming.

Consider the impact of public policy changes on First Nations and review research prior to making decisions.

3.3.3 Improve the Quality of Prevention and Treatment Services for Nova Scotians

A primary goal of the Gaming Strategy Initiative is to ensure social responsibility in gaming through providing information, education and treatment to all Nova Scotians who desire or need it. The Discussion Paper outlines intervention and the best treatment services being available to those who experience problems resulting from high-risk or problem gambling as a cornerstone of the future vision of gaming.

Many respondents supported the need for a broad-based information and education campaign to be undertaken.

The general comment expressed by these respondents was that everyone needs to be educated with a particular focus on "at-risk" and problem players.

Some respondents commented that excellent work has been done to date regarding education campaigns for Responsible Gaming and this represents a great first step. In this regard, particular mention was made of the work being done by NSGC and others regarding Responsible Gaming Awareness Week. However, concerns were expressed that it was insufficient for this message to be only promoted one week of the year.

There was a need identified by many respondents for promotion and education of responsible gaming to be done on a regular basis to be most effective.

A number of respondents also noted the importance of government recognizing the impact of current advertising on consumers and suggested that government exercise caution in the area of marketing of gambling products. There was concern that the current advertising undermines the responsible gaming messages and that restrictions on advertising should be given careful consideration.

One respondent also noted that the industry should be consulted regarding ideas for promoting responsible gaming.

A number of respondents suggested that the sectors impacted by gaming should get together annually, including operators, to develop ideas for responsible gaming.

A number of respondents indicated the development of standards for problem gambling and measurements to evaluate the effectiveness of problem gambling treatment services are an important means of delivering on this vision. These respondents suggested:

Develop standards for problem gambling treatment and measure services accordingly.

Incorporate prevention and treatment principles into the strategy.

There was also support amongst respondents for increasing funding for problem gambling treatment services to attain the standard envisioned in the Discussion Paper. The following demonstrate the views expressed by a number of respondents:

Increase funding for prevention and treatment services for problem gambling proportionate to gambling revenues; and, to a level in order to support salary, supervision and operating expenses of at least one problem gambling professional in each rural district health authority with a corresponding appropriate number of positions in urban centres.

Strengthen and enhance prevention and treatment services to better address the adverse social impacts of gaming.

One stakeholder organization recommended that the Province undertake a pilot project working in conjunction with a District Health Authority to review the costs and benefits of a comprehensive Prevention and Early Identification Treatment Strategy. A number of respondents also recommended that the Province seek expert advice regarding the adverse effects of gaming and how best to manage this impact as an input to the strategy development process.

3.3.4 Mandate of Gaming Strategy Initiative

A number of respondents highlighted the need for communication and coordination between provincial departments which have some involvement in gaming. Collaboration and sharing of information among all relevant departments and agencies is necessary if the future vision of gaming is to be achieved.

A number of respondents noted the need to ensure the strategy development process is a cooperative undertaking between government departments including the Office of Health Promotion and District Health Authorities.

3.3.5 Strengthen Gaming Safeguards

As noted in the Discussion Paper and confirmed in the responses, the effective regulation of all gaming to ensure controlled outcomes, and the security and integrity of products and systems is of paramount importance.

A number of respondents commented favourably upon the effective regulation of gaming today. However, concern was expressed regarding the lack of regulatory support of social responsibility standards.

Many stakeholders identified the need for government to strengthen the role of the regulator of gaming and include responsibility for overseeing socially responsible gaming.

There was strong agreement that a new regulatory framework is required which focuses on enforcement of social responsibility standards which are applicable to all organizations involved in the gaming sector.

A number of respondents suggested the introduction of mandatory reporting on social and economic costs/benefits by operators - it was felt there is a need to view economic growth within the parameters of successful responsible gaming controls and new games meeting social responsibility criteria which are legislated.

In this regard, a number of respondents commented upon the need for greater regulation of continuous forms of electronic gaming.

A common view expressed by respondents was the need to expand the regulation of continuous forms of electronic gaming.

3.3.6 Strengthen the Gaming Decision-Making Process

Through the public input and stakeholder meeting process, there was an identified need for gaming decisions to be supported by independent, credible research. A concern expressed by many respondents was the lack of available research providing a cost-benefit analysis of gaming in Nova Scotia. There was a great deal of support for such research being undertaken as a first step in developing the Gaming Strategy. Such research was viewed as necessary to inform the process of defining the terms "socially responsible" and "economic sustainability" used in the vision statement in the Discussion Paper.

Many respondents suggested that a cost-benefit analysis be conducted as a starting point in the strategy development process and that stakeholder meetings be re-commenced to discuss appropriate directions for gaming.

A number of respondents also noted the availability of excellent research on gaming produced in Nova Scotia and that such research should be considered in the decision-making process.

There was strong support by respondents for government to review relevant research, particularly research undertaken in Nova Scotia.

There were several suggestions regarding the definition of objective, credible research.

A number of respondents indicated that quality research was characterized by the use of controlled variables, sufficient sample sizes, scientifically and clinically rigorous experimentation and being replicable.

This feedback highlights the need to clarify the roles and responsibilities of decision makers in the gaming process.

4. Conclusion and Next Steps

This summary document completes the second phase of the Gaming Strategy Initiative. The Government of Nova Scotia considers the Gaming Strategy Initiative a priority, and as such, this information will inform Phase III which is focused on the development of a comprehensive provincial Gaming Strategy.

Nova Scotians have provided many and varying ideas on the future vision of gaming in Nova Scotia. The considerable consensus of opinion expressed regarding the need for well-defined standards of social responsibility with effective evaluation mechanisms and for a clear definition of economic sustainability will greatly inform the strategy development process.

There was considerable interest expressed in developing consistent standards of social responsibility applicable to all stakeholders in the gaming industry and there was strong support for government playing a larger role in social responsibility. First Nations were regarded by many stakeholders as an important "government" stakeholder, and charitable organizations were identified as stakeholders requiring particular consideration.

There was consensus regarding the need for gaming decisions to be supported by sound research and for efforts to be directed at public education and awareness campaigns. The regulation of gaming was viewed as important by many respondents and recommendations included strengthening the regulator's role. Support was also expressed for more funding to be directed to problem gambling prevention and treatment efforts.

The Government of Nova Scotia has articulated an objective to deliver on the future vision of gaming which promotes social responsibility and economic sustainability. Balancing these two important concepts is a challenge but an integral part of strengthening accountability in the management of gaming. The contributions people and organizations made to this phase of the Gaming Strategy initiative are greatly appreciated and provide important guidance to the future direction of gaming in Nova Scotia.